Professional Development Planning

PDTRACK

Supervisor and PD Advisor Training Guide

March 2006

KENTUCKY
ADULTEDUCATION
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Training server: https://testPDtrack.kyvae.org

Production server: https://PDtrack.kyvae.org

Supervisor Console

Objectives
- Review a PD plan.
- View existing comments and add new comments in a PD plan.
- Approve and reject a PD plan.
- Manage self-directed activities.
- Run reports.

Activities
You will use the **training server** (https://testPDtrack.kyvae.org/) for the activities in this chapter. You have been assigned a PDtrack training session **user name** and **password** (this should be highlighted on page 8). **This account will be used for the entire training.**

Review a PD plan.
- In the **Supervisor Console**, you will see **Submitted PD Plans**. Click on the number to the right of this. This will allow you to access a listing of all plans submitted by your employees. You can review PD plans by clicking on the username of an employee.

View existing comments and add new comments in a PD plan.
- Under each activity in a PD plan, there is a button titled **Add/View Activity Comments**. If there are existing comments for an item, the button will also include **(Last comment on *date time*)**.
  - ◆ View existing comments and respond — To view existing comments, click on **Add/View Activity Comments (Last comment on *date time*)**. All comments for this item will be listed in sequential order with the date, time, and who submitted the comment. To respond to a comment, click on **Add Comments**. Type your comment in the text box, then click **Save Comment**. Now click on **Return to Plan**.
  - ◆ Add new comments — Let's add a comment to an item that has no comments yet. Click on **Add/View Activity Comments**. C lick on **Add Comments**. Type your comment in the text box, then click **Save Comment**. Now click on **Return to Plan**.

Approve and reject a PD plan.

- Once you have completed reviewing a submitted PD plan and are ready to approve or reject it, scroll to the bottom of the plan. You will see a section titled **Approve or Reject Plan**. Below this header, there are two "radio" buttons: **Approved** and **Rejected**. Select the appropriate radio button. There is also a **Notes to Submitter** field to comment on the overall plan and/or your decision. When your decision and comments are complete, click **Save**.
  - ◆ IMPORTANT NOTE ON APPROVED PLANS — **Please keep a close watch on your employees' PD plans.** Once you approve a plan, the employee must commit to the plan to make it active. To easily review plan statuses, click on **Status** from the listing of submitted plans. Any plan in **Approved** status indicates that the employee has not committed to the plan. An employee cannot enroll in the items in their plan until the plan is in **Active** status.

Manage self-directed activities.

- Supervisors and PD Advisors act as facilitators for the self-directed activities (SDAs) of their employees. Documentation of SDA completion should be kept in employee files. When an employee completes a self-directed activity, you must change their status from their PD plan. (If an SDA item has not been included in an employee's PD plan, a new plan with the appropriate SDA item will have to be submitted, approved, and committed to before you can manage their SDA.)
  - ◆ SDA completion — To indicate an employee has completed a planned SDA, access their active plan and find the appropriate SDA. Click on the button, **Select Registration**. This which will generate a pop-up window of the planned SDAs. Click on the title of the appropriate SDA. This will change the status of the selected SDA to **Enrolled**. Next to **Status** in the SDA, you will now see a drop-down box that will show **Enrolled**. To change the status, select the appropriate status from the drop-down list, then click on 🗃 to save the new status.

Run reports.

- From the top navigation bar, click on **Reports**. This will take you to the list of reports available to you. Currently, only one report is usable: **Activity By Location**.

  - ◆ Activity By Location
  1. Click on **Run "Activity By Location" Report**.
  2. Select your preferred report format. If you will only be viewing the information on your screen, **View in web browser** is recommended. If you will be printing or emailing the report, PDF is recommended (select **Create PDF for printing and email**).
  3. Select the desired **Program Year** from the drop-down box.
  4. Select your **Location** from the drop-down box.
  5. Click **View Report**. The report will be in a pop-up window and will list all of the activity for each employee at your location.

Appendix: PDtrack user role information

As a PDtrack user, you will likely identify with one or more of the following user roles:

- **Registrant** — Registrants can engage in PD activity: browse the catalog for items, build and submit PD plans, and run audits. **Known Registrants** have an active AERIN account and can enroll in catalog items at preferred pricing (generally no fee), and can propose annual PD plans. **Unknown Registrants** do not have an active AERIN account and can enroll in items by paying a standard fee.

- **Supervisor** — Supervisors can access all Known Registrant functions and approve Known Registrant PD plans at their location code. They can also manage Known Registrants' statuses for self-directed activities.

- **PD Provider Rep** — PD Provider Reps are authorized by a provider to submit items for inclusion in the catalog (subject to the required approvals). The item may be local or statewide in accordance with the provider. PD Provider Reps can also manage items' statuses (open for registration, full, cancelled, closed).

- **Facilitator** — Facilitators are the people who deliver items. They can access Registrant functions and manage rosters for items (updating the status of registrants).

- **Administrator** — Administrators are assigned specific administrative roles to manage all facets of the system. The roles are predefined using a configurable set of system access privileges, and can be changed by appropriate administrators at any time. Specific management functions include:
    - Review and approval of new items for inclusion in the catalog
    - Item creation and maintenance
    - System configuration

Appendix: Glossary of key terms

Term	Definition
AERIN	The database of record for KYAE provider employees, it is used to create and manage user account information for known users in PDtrack. AERIN is also used to enable progress tracking of these users toward their professional development goals.
Calendar	A date-based graphical display of catalog items that have been configured to appear on the calendar.
Cart	A temporary user-selected bundle of catalog items being considered for approval submission and/or enrollment and purchase.
Catalog	Central repository of all learning and professional development opportunities. Each unique learning opportunity is referred to as a catalog item. Item types include: off-line event; online event; online course; self-directed activity (reading, writing, etc.).
eRMA	A system that enables the delivery of online catalog items to Registrants through real-time integrations with several courseware management systems available via KYVAE (http://www.kyvae.org/).
Event	Any catalog item that is delivered at a specified time. These types of catalog items may be displayed in a graphical calendar view.
Item	A specific learning opportunity within the catalog.
PD	Professional Development
PDU	Professional Development Unit
Provider	The organization managing the offering of a catalog item.
SDA	Self-Directed Activity

Appendix: Goal setting

What makes a good goal?

Goal-setting wisdom has taught us a good goal must be written down and **SMART**:
- **S**pecific
- **M**easurable
- **A**ttainable
- **R**esults-oriented
- **T**ime-bound

Example of a SMART Goal:

"As a result of using small group instruction, the percentage of learners in my class will persist long enough to improve their reading scores by two levels this year."

- **Specific —** an increase in the number of learners who will continue coming to class long enough so they will improve their reading skills by two levels;
- **Measurable —** improve reading skills by two levels;
- **Attainable —** presumably possible to achieve;
- **Results-oriented —** specific results are stated;
- **Time-bound —** by this year's separation date of June 30.

Is this a SMART goal?

Think about what this writer is accomplishing and what is left out with the following statement:

"I want to take TABE training."

Why is this not a SMART goal?

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Appendix: Training accounts

Use these accounts in order to access the of PDtrack training server.

NOTE: All user names are case-sensitive and use **train** as the password.

Registrant user names	Supervisor user names	PD Advisor user names
TTRegistrant21	TTSupervisor1	TTPDA1
TTRegistrant20	TTSupervisor1	TTPDA1
TTRegistrant19	TTSupervisor2	TTPDA2
TTRegistrant18	TTSupervisor2	TTPDA2
TTRegistrant17	TTSupervisor3	TTPDA3
TTRegistrant16	TTSupervisor3	TTPDA3
TTRegistrant15	TTSupervisor4	TTPDA4
TTRegistrant14	TTSupervisor4	TTPDA4
TTRegistrant13	TTSupervisor5	TTPDA5
TTRegistrant12	TTSupervisor5	TTPDA5
TTRegistrant11	TTSupervisor6	TTPDA6
TTRegistrant10	TTSupervisor6	TTPDA6
TTRegistrant9	TTSupervisor7	TTPDA7
TTRegistrant8	TTSupervisor7	TTPDA7
TTRegistrant7	TTSupervisor8	TTPDA8
TTRegistrant6	TTSupervisor8	TTPDA8
TTRegistrant5	TTSupervisor9	TTPDA9
TTRegistrant4	TTSupervisor9	TTPDA9
TTRegistrant3	TTSupervisor10	TTPDA10
TTRegistrant2	TTSupervisor10	TTPDA10
TTRegistrant1	TTSupervisor11	TTPDA11
TTRegistrant22	TTSupervisor11	TTPDA11
TTRegistrant23	TTSupervisor12	TTPDA12
TTRegistrant24	TTSupervisor12	TTPDA12
TTRegistrant25	TTSupervisor13	TTPDA13
TTRegistrant26	TTSupervisor13	TTPDA13
TTRegistrant27	TTSupervisor14	TTPDA14
TTRegistrant28	TTSupervisor14	TTPDA14
TTRegistrant29	TTSupervisor15	TTPDA15
TTRegistrant30	TTSupervisor15	TTPDA15